

## **Community Acquisitions Interface Development List**

1. Ability to sort a selection list, purchase order or invoice by any field. Title and author sorts are highly desired.
2. The ability to batch updated funds in the batch updater on selection lists just like it is on purchase order. Having to edit individually on the selection list negatively impacts workflow.
3. Allow a purchase order status of "Complete" when each line item status on the purchase order equals either "Received" or "Cancelled". Current status display for a purchase order when multiple statuses received and cancelled is incorrect. Status should be complete when only those two statuses are present on a purchase order.
4. (Tie) Need an additional action menu at bottom of all relevant screens or navigation back to the top.
4. (Tie) When creating manual order, a new tab is created with each title added. A new tab should not open under this circumstance.
5. Fiscal Year development:
  - A. Create a granular Fiscal Year setting that allows the library to define and run concurrently different fiscal year calendars. The ability to set the fiscal year should be by fund and/or by funding source where inheritance is a choice.

Libraries may have individual concurrent year funding sources or funds where some require a January–December calendar fiscal year, others that require a September–August federal fiscal year, and still others that are July–June local government fiscal year.
  - B. Allow fund tags to rollover at fiscal year-end, Create a setting to make the fund tag rollover optional.
6. More streamlined way to put money in funds, credit, and remove money from funds as well as to transfer funds. More funds should be in drop down menus and funds from previous fiscal years should not display in certain drop down menus.

## Development requests that were not high priority for session attendees

- Search filtering for funds not functioning correctly. Cannot filter by fund year **(This appears to be functioning correctly in 2.7.2).**
- Create a master provider record that can be used by the library to accommodate set-up of multiple accounts a library system may have with that provider.
- Ability to sort and narrow down funds for display. Currently difficult to distinguish. If a library has 5 branches and a fund in each branch called “Adult Fiction” (which the documentation clearly states you can do), then when a fund must be chosen as on line items, batch updating, on purchase orders, and for distribution formulas, the user cannot distinguish one branch's “Adult Fiction” from another branch's “Adult Fiction. Therefore naming conventions must be adopted that also require libraries and vendors to change their setups for financials, as well as cataloging and processing communications. The end user should be able to choose the branch and then the fund (and if that were sticky) to make the correct fund choice.
- Create several acquisitions sources for reports.
- Currently, open tabs in Evergreen do not have adequate labelling. The label needs to identify the interface or menu opened (this is a problem across Evergreen Interfaces). For example, every time a tab is opened from the Admin->Server Administration->Acquisitions submenu the tab is labeled “Server Settings”. Very confusing, especially when you have multiple tabs open.
- Currently, choices within acquisitions screens (searching, fund choice, library system choice, etc.) do not stick. Choices need to be sticky to improve workflow.
- Default order agency should be configurable by library. Some libraries need system rather than branch.
- Where fields are required on individual screens, they should be marked as such and when not used or used improperly a meaningful error message should alert the user. For example, the Provider field in the Load MARC Order

Records is required or the load fails. Nothing indicates it is required, nor does the failed error message indicate that the field was missing.

- Error messages for batch loading need to be more useful and clear, using natural language. For example, when a load fails and the error message is “Event: 2002:DATABASE\_QUERY\_FAILED -> The attempt to query to the DB failed.” it could say “Provider field empty.”
- Streamlined menu navigation that brings the Admin->Server Administration->Acquisitions submenu under the Acquisitions menu utilizing the current permissions.
- Purchase orders should automatically update changes without reload – any change automatic without refresh.
- Go back should just go back one screen not to where you started.
- Purchase order ID and name need to be present on purchase orders and invoices distributions and subtotals and on all search results for purchase orders. Create a library setting that provides a choice of transmitting the PO ID or the PO Name.
- Create a setting for invoice creation from a non-EDI purchase order that allows for a yes/no decision to populate the invoice with the line item purchase order price(s).
- Create the ability to receive and invoice in one step where receipt of an item creates the invoice item. This should be a granular setting with that must be turned on (the default is off) that allows choices by session, or by library.
- General UI and navigation needs improvement – Screens within screens, scrolling, place action buttons near library (May need to wait until added to Angular JS. Can this be (or is it) expedited for web client?
- The patron request feature is buggy (need more information about this one).